

ProjectSuite Enterprise Edition (PSEE) Utility Module

Overview for
Utility Representatives

Presented by
PSEE Functional Application Coordinators (FACs)

Purpose of the Utility Module

- ▶ 1 stop shop for Utility Staff - Inside and outside of the Department
- ▶ Dashboard view for quick referencing
- ▶ Assist in the sharing of utility documents internally and externally
- ▶ Reminder alerts that attention/action is needed
- ▶ Historical documents

Functional Areas

- ▶ Dashboard/Assignments
- ▶ PSM Scheduling
- ▶ OSP Permits
- ▶ Plans
- ▶ Utility Work Schedule
- ▶ Agreements
- ▶ Invoices
- ▶ Subordinations
- ▶ Address Book

When you log in, you will see...

The screenshot displays the ProjectSuite Enterprise Edition dashboard. At the top, a blue header bar contains the ProjectSuite logo and the text 'Enterprise Edition' on the left, and 'User: JANE DOE' with a user icon on the right. Below the header, there are two rows of navigation buttons. The first row has 'UTILITIES' (highlighted) and 'HELP'. The second row contains 'PSM SCHEDULING', 'PLANS', 'UTILITY WORK SCHEDULES', 'AGREEMENTS', 'INVOICES', 'OSP PERMITS', 'SUBORDINATIONS', and 'ADDRESS BOOK'. The main content area is titled 'Utilities (Click to collapse)' and contains two sections: 'My Assignments (Click to collapse)' and 'FYI Assignments (Click to collapse)'. Both sections indicate 'There are currently no Assignments'.

ProjectSuite Enterprise Edition

User: JANE DOE

UTILITIES HELP

PSM SCHEDULING PLANS UTILITY WORK SCHEDULES AGREEMENTS INVOICES OSP PERMITS SUBORDINATIONS ADDRESS BOOK

Utilities (Click to collapse)

My Assignments (Click to collapse)
There are currently no Assignments

FYI Assignments (Click to collapse)
There are currently no Assignments

- ▶ Dashboard first
- ▶ Your Name in the top right
- ▶ All Functional areas

What am I to do?

PSM SCHEDULING	PLANS	UTILITY WORK SCHEDULES
Utilities (Click to collapse)		
My Assignments (Click to collapse)		
[View]	Project 222477-2	Project Phase 32 - Prelim Engineering Consultant
Page 1 (Showing Items 1 to 1 of 1) Show per page 10		
FYI Assignments (Click to collapse)		
There are currently no Assignments		

Edit Reviewer Assignment Entry

Project: 222477- 2
Project Phase: 32 - Prelim Engineering Consultant
Reviewer: Carla Hodges
Due Date: 9/14/2016
Assignment Status: In Progress
Assignment Type: Plan
Sequence:
Request Description: This description field is for explaining to reviewer(s) what is expected of them during their review.
[Include Plan Document](#)

PSEE Plan Documents (Click to collapse)

EDMS Doc No ▼	Created Date	Document Name	Description	Type	
5310694	9/9/2016	test.docx	This description is related to attached document.	PLANS	View

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

Save

Cancel

PSM Scheduling

- Changes recorded in PSM system
- Filter to only a select group of activities that related to Utilities

Activity	Description
205*****	Phase 56 Encumbrance
113*****	Roadway Plans
126*****	Utility Relocation
204*****	Production Date
228*****	Submit Utility Data
264*****	Utility Contact
265*****	Utility Pre-Design Conf
266*****	Utilities Certified
280*****	Letting Date
283*****	Open Design Build Bid
289*****	LAP Letting
851*****	Utility Depend Time to Prj Mgr

UTILITIES

HELP

PSM SCHEDULING

PLANS

UTILITY WORK SCHEDULES

AGREEMENTS

INVOICES

OSP PERMITS

SUBORDINATIONS

ADDRESS BOOK

PSM Scheduling (Click to collapse)

Search (Click to collapse)

Project: -

Responsible:

District:

Start Date From: To:

County:

All BAY CALHOUN DIST/ST-WIDE ESCAMBIA FRANKLIN GADSDEN

Finish Date From: To:

Activity ID:

Search Reset

Result (Click to collapse)

Project	Activity	Description	Responsible	Start Date (A=Actual)	Finish Date (A=Actual)	Remaining Days	Total Float	Production Date	Letting Date
430463-1	280010000	LETTING DATE	LD.FY17.DEC16	10/26/2016	10/26/2016	1	0	05/27/2016	10/26/2016
417677-4	280070000	LETTING DATE	LD.FY17.JUL16	7/14/2016	7/14/2016	A		03/15/2016	07/14/2016
435518-1	280010000	LETTING DATE (G/W 435518-3)	LD.FY17.AUG16	7/27/2016	7/27/2016	A		02/09/2016	07/27/2016
435518-3	280010000	LETTING DATE (G/W 435518-1)	LD.FY17.AUG16	7/27/2016	7/27/2016	A		02/09/2016	07/27/2016
436853-1	280070000	LETTING DATE (G/W 433923-2)	LD.FY17.AUG16	8/11/2016	8/11/2016	A		04/14/2016	08/11/2016

Page 1 (Showing Items 1 to 5 of 5) Show per page 10 25 50

From: To: [Export Results](#)

OSP Permits

The screenshot displays a web application interface for 'OSP Permits'. At the top, there is a horizontal navigation bar with eight tabs: 'PSM SCHEDULING', 'PLANS', 'UTILITY WORK SCHEDULES', 'AGREEMENTS', 'INVOICES', 'OSP PERMITS' (which is highlighted), 'SUBORDINATIONS', and 'ADDRESS BOOK'. Below the navigation bar is a blue header for the 'OSP Permits' section, labeled '(Click to collapse)'. Underneath this header is a search section, also labeled '(Click to collapse)'. The search section contains several input fields: 'Roadway ID:*' with a warning icon, 'Application Date' with 'From:' and 'To:' date pickers, 'Close Date' with 'From:' and 'To:' date pickers, 'Approval Date' with 'From:' and 'To:' date pickers, and 'Expiration Date' with 'From:' and 'To:' date pickers. At the bottom of the search section are two buttons: 'Search' and 'Reset'.

- ▶ View only. PSEE users cannot update any data in the OSP Permit area.
 - ▶ Information from the One-Stop Permitting (OSP) application.
- ▶ OSP is currently having modifications. Once they are complete, PSEE can be enhanced/updated to reflect these improvements.

Plans

UTILITIES

HELP

PSM SCHEDULING

PLANS

UTILITY WORK SCHEDULES

AGREEMENTS

INVOICES

OSP PERMITS

SUBORDINATIONS

ADDRESS BOOK

Plans (Click to collapse)

Search (Click to collapse)

Project:

District:

County:

AllBAYCALHOUNDIST/ST-WIDEESCAMBIAFRANKLINGADSDEN

Project Phase:

Plan Phase:

Utility Project Manager:

EOR:

Sequence:

Plan Action:

Utility Coordinator:

SearchReset

Result (Click to collapse)

	Project	Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOR
View	409462-3	56 - Construction Utility	01	PHASE II CONSTRUCTABILITY	Revised RGB Markup From UAO		Adkison, Traci	
View	433569-1	36 - Prelim Engineering Utility	01	PHASE I INITIAL	Initial Contact	Barfield, Teresa	Adkison, Traci	

Page 1 (Showing Items 1 to 2 of 2) Show per page 10 25 50

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- ▶ Allows assignments to be create by FDOT staff to send contact letters with plans for review and mark up to UAOs.
 - ▶ Other related documents such as conflict matrices can also be included in these assignments.

Utility Work Schedules (UWS)

UTILITIES

HELP

PSM SCHEDULING

PLANS

UTILITY WORK SCHEDULES

AGREEMENTS

INVOICES

OSP PERMITS

SUBORDINATIONS

ADDRESS BOOK

Utility Work Schedules (Click to collapse)

Search (Click to collapse)

Project: -

District:

County:

AllBAYCALHOUNDIST/ST-WIDEESCAMBIAFRANKLINGADSDEN

Project Phase:

Utility Work Schedule Action:

UAO Company Name:

Utility Coordinator:

Approved Document Date: From: To:

Time Prior To Construction:

Sequence:

Utility Work Schedule Type:

Utility Project Manager:

Operations Utility Coordinator:

Preliminary Plans Date: From: To:

Time During Construction:

Search

Reset

Result (Click to collapse)

Project	Project Phase	Sequence	Utility Work Schedule Action	Utility Work Schedule Type	UAO	Utility Project Manager	Utility Coordinator	Operations Utility Coordinator	Preliminary Plans Date
[View]	433569-1	56 - Construction Utility	01	Returned To UAO With Comments	UTILITY WORK SCHEDULE	Tallahassee, City of	Adkison, Traci		

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

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- Allows an assignment to be created for both UAOs and FDOT staff to review Utility Work Schedules.
- Will be able to provide certifications through this functional area as well.

Agreements

UTILITIES

HELP

PSM SCHEDULING

PLANS

UTILITY WORK SCHEDULES

AGREEMENTS

INVOICES

OSP PERMITS

SUBORDINATIONS

ADDRESS BOOK

Agreements (Click to collapse)

Search (Click to collapse)

Project:

District:

County:

AllBAYCALHOUNDIST/ST-WIDEESCAMBIAFRANKLINGADSDUN

Search

Reset

Project Phase:

Agreement Action:

Contract #:

Utility Project Manager:

Operations Utility Coordinator:

Sequence:

Agreement Status:

UAO:

Utility Coordinator:

Result (Click to collapse)

Project	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Current Contract Amount	Execution Date	Utility Notice To Proceed Date	UAO	Utility Project Manager	Utility Coordinator	Operations Utility Coordinator
[View]	52 - Construction Consult/Contract	01	Agreement	Fully Executed Agreement		\$ 4,123,307.00	10/31/2013	10/10/2016	Tallahassee, City of			

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

From: To: [Export Results](#)

- ▶ Allows an assignment to be created and tracked Agreement review assignments of both UAOs and FDOT staff
- ▶ Once Agreements are ready for execution, assignments can be created for the UAO, DUA/E, Legal and Management to sign off.

Invoices

UTILITIES

HELP

P&M
SCHEDULING

PLANS

UTILITY
WORK
SCHEDULES

AGREEMENTS

INVOICES

O&P PERMITS

SUBORDINATION

ADDRESS
BOOK

Invoices (Click to collapse)

Search (Click to collapse)

Project:

District:

County:

AllBAYCALHOUNDIST/ST-WIDEESCAMBIAFRANKLINGADSDEN

Search

Reset

Project Phase:

Contract #:

Invoice Status:

UAO:

Sequence:

Invoice #:

Invoice Date:

From: To:

Result (Click to collapse)

Project	Project Phase	Sequence	Contract #	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period From	Invoice Period To	UAO	Execution Date	Notice To Proceed Date	End Date	
View	433569-1	52 - Construction Consult/Contract	01	C9D19	\$ 4,123,307.00	010	\$ 10,000.00	PENDING	PARTIAL	10/10/2016	9/1/2016	9/30/2016	Tallahassee, City of	10/31/2013	10/10/2016	10/30/2023

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

From: To: [Export Results](#)

- ▶ Allows an assignment to be created for both UAOs and FDOT staff to review Invoices.
- ▶ Once Invoices are ready for submittal, assignments can be created for the UAO and DUA/E. This includes returning invoices for corrections, and alerting a UAO that an invoice has been processed for payment.

Subordinations

UTILITIES HELP

P&M SCHEDULING PLANS UTILITY WORK SCHEDULES AGREEMENTS INVOICES O&P PERMITS SUBORDINATIONS ADDRESS BOOK

Subordinations (Click to collapse)

Search (Click to collapse)

Project: Project Phase: Sequence:

District: Parcel Number: UAO:

County: Utility Project Manager: Utility Coordinator:

County: All BAY CALHOUN DIST/ST-WIDE ESCAMBIA FRANKLIN GADSDEN

Sent to UAO: From: To: Due Date: From: To:

Received From UAO: From: To: Received from R/W: From: To:

To Legal: From: To: From Legal: From: To:

To Director: From: To: From Director: From: To:

To R/W Recording: From: To: Recorded From R/W: From: To:

Recorded to UAO: From: To:

Search Reset

Result (Click to collapse)

Project	Project Phase	Sequence	Parcel Number	UAO	Utility Project Manager	Utility Coordinator	Sent to UAO	UAO Due Date	Received From UAO	Received From R/W	To Legal	From Legal	To Director	From Director	To R/W Recording	Recorded From R/W	Recorded To UAO
View	433589-1	46 - Utility Right Of Way	01	0801	Tallahassee, City of	Barfield, Teresa	8/3/2016	8/10/2016	8/9/2016	8/1/2016	8/10/2016	8/25/2016			8/29/2016	9/9/2016	9/12/2016

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

From: To: [Export Results](#)

- ▶ Allows an assignment to be created for both UAOs and FDOT staff to review Subordinations.
- ▶ Once Subordinations are ready for execution, assignments can be created for the UAO, DUA/E, Legal and Management to sign off.
 - ▶ This includes returning Subordinations for corrections, and alerting a UAO that Subordinations have been recorded.

Address Book

The screenshot displays the 'Address Book' section of a web application. At the top, a navigation bar contains tabs for 'PSM SCHEDULING', 'PLANS', 'UTILITY WORK SCHEDULES', 'AGREEMENTS', 'INVOICES', 'OSP PERMITS', 'SUBORDINATIONS', and 'ADDRESS BOOK'. The 'ADDRESS BOOK' tab is selected and highlighted. Below the navigation bar, a blue header bar reads 'Address Book (Click to collapse)'. The main content area contains search filters: 'District:' with a dropdown menu showing 'District 3'; 'Contact Name:' with a text input field and a 'Clear' link; 'Contact Type:' with a dropdown menu showing 'All'; and 'Project:' with two empty input boxes separated by a hyphen. At the bottom left of the filter section are 'Search' and 'Reset' buttons.

- ▶ Has contact information about people or organizations that are involved with a project.
- ▶ There are two types of contacts defined in the Address Book functional area.
 - ▶ *Internal User is defined as any user who logs into the application. This includes consultants who do business for FDOT and UAO who register for an ISA account.*
 - ▶ *External User is defined non-FDOT staff or organizations who are involved in the project but do not log into the application.*

COMMON QUESTIONS

How do I get access?

<https://www3b.dot.state.fl.us/ProjectSuite/Pages/Login/LogIn.aspx>

- ▶ Create ISA Account
 - ▶ If you use ERC, OSP, or FTA - you have an account
 - ▶ Password will need 8 characters including 1 Upper, 1 Lower & 1 Special Character
- ▶ Once ISA Account is confirmed - log into PSEE
 - ▶ Select District(s) you work with
 - ▶ Enter your Utility Company Name in the text box
- ▶ Help doc will be emailed

Email example of Requesting Access

From: Poole, David
Sent: Wednesday, October 19, 2016 8:15 AM
To: FDOT-PSEEDUAD1@dot.state.fl.us Who received your email at FDOT.
Cc: Poole, David
Subject: ProjectSuite Enterprise Edition Utility Access have been requested for District 1

Please grant me Utility access for District 1 for following companies, The district where you requested access.

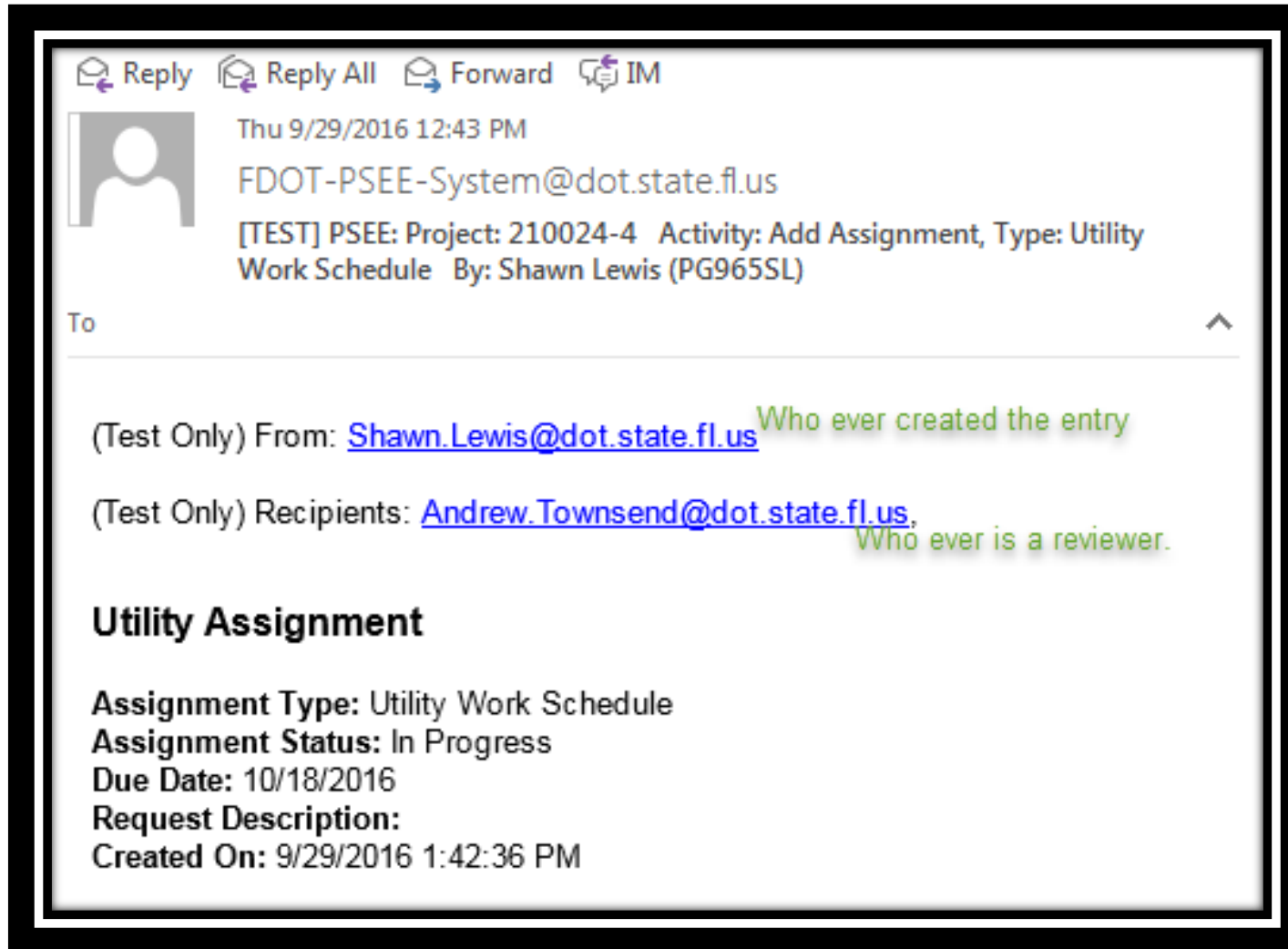
To grant these Access, go to the [Admin](#) screen and select the Utility Company Member Maint tab.

DAVID POOLE
CENTURYLINK
DAVID.C.POOLE@CENTURYLINK.COM
(850)599-1479

The information provided to FDOT.

This communication is the property of CenturyLink and may contain confidential or privileged information. Unauthorized use of this communication is strictly prohibited and may be unlawful. If you have received this communication in error, please immediately notify the sender by reply e-mail and destroy all copies of the communication and any attachments.

How do I know I have an assignment?



How do I respond to an Assignment?

PSM SCHEDULING	PLANS	UTILITY WORK SCHEDULES
Utilities (Click to collapse)		
My Assignments (Click to collapse)		
View	Project 222477-2	Project Phase 32 - Prelim Engineering Consultant
Page 1 (Showing Items 1 to 1 of 1) Show per page 10		
FYI Assignments (Click to collapse)		
There are currently no Assignments		

Edit Reviewer Assignment Entry

Project: 222477- 2

Project Phase: 32 - Prelim Engineering Consultant

Reviewer: Carla Hodges

Due Date: 9/14/2016

Assignment Status: In Progress

Assignment Type: Plan

Sequence:

Request Description: This description field is for explaining to reviewer(s) what is expected of them during their review.

[Include Plan Document](#)

PSEE Plan Documents (Click to collapse)

EDMS Doc No	Created Date	Document Name	Description	Type	View
5310694	9/9/2016	test.docx	This description is related to attached document.	PLANS	View

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

How do I attach a document?

Edit Reviewer Assignment Entry

Project:

222477- 2

Project Phase:

32 - Prelim Eng

Reviewer:

Carla Hodges

Due Date:

9/14/2016

Assignment Status:

In Progress

Assignment Type:

Plan

Sequence:

Request

This description

Description:

their review.

[Include Plan Document](#)

[Exclude Plan Document](#)

File:

Select File

0 %

Description:

0 of 200

Limitations on uploading files?

► FILE SIZE

- No file is too big!!!

► FILE TYPE

- All file types acceptable - PDF, JPEG, XLS, etc

***If you get an error message about the size OR type -
email your FDOT Utility Contact!***

What if I have no document to attach as a response to my assignment?



Can I remove/delete a Document?



What do the reminders look like?

From: <FDOT-PSEE-System@dot.state.fl.us>

Date: September 26, 2016 at 6:01:41 AM EDT

Subject: PSEE: Project 415111-1 Review Assignment Action PAST DUE.

Your assigned review for Invoice is PAST DUE. Please handle promptly.

Assignment Created: 7/10/2016 12:17 PM

Assignment Due: 7/11/2016

Request Description: test production

Utility Coordinator:

What fields are required for FDOT to enter?

PLANS

- ▶ Plan Phase
- ▶ Plan Action
- ▶ Utility Coordinator

UWS

- ▶ Project Phase
- ▶ Sequence
- ▶ UWS Action
- ▶ UWS Type
- ▶ Utility Coordinator

AGREEMENTS

- ▶ Agreement Action
- ▶ Agreement Status
- ▶ UAO

INVOICES

- ▶ Project Phase
- ▶ Sequence
- ▶ Contract #
- ▶ Invoice Status
- ▶ UAO
- ▶ Utility Coordinator

Subordinations

- ▶ Project Phase
- ▶ Sequence
- ▶ Parcel Number
- ▶ UAO
- ▶ Utility Coordinator

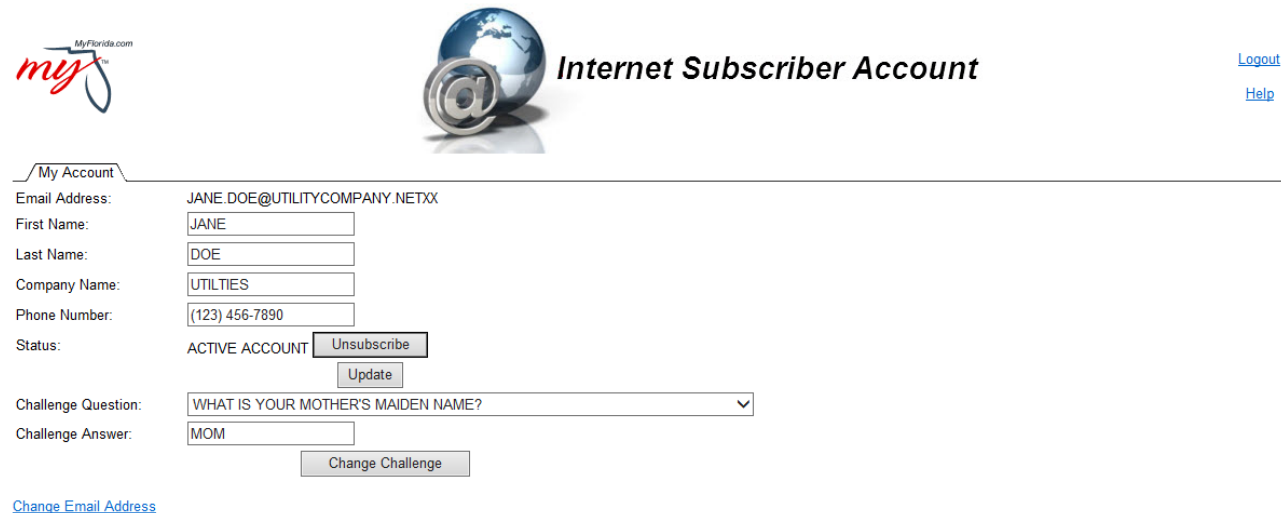
What if I need to update my contact info?

Log into the ISA application

<https://www3.dot.state.fl.us/internetsubscriberaccount/default.aspx>

This would be if simple info change - address, cell number, office ext., etc.

- ▶ Modify information
- ▶ Click “Update”



MyFlorida.com
my

Internet Subscriber Account [Logout](#) [Help](#)

My Account

Email Address: JANE.DOE@UTILITYCOMPANY.NETXX

First Name: JANE

Last Name: DOE

Company Name: UTILITIES

Phone Number: (123) 456-7890

Status: ACTIVE ACCOUNT [Unsubscribe](#) [Update](#)

Challenge Question: WHAT IS YOUR MOTHER'S MAIDEN NAME?

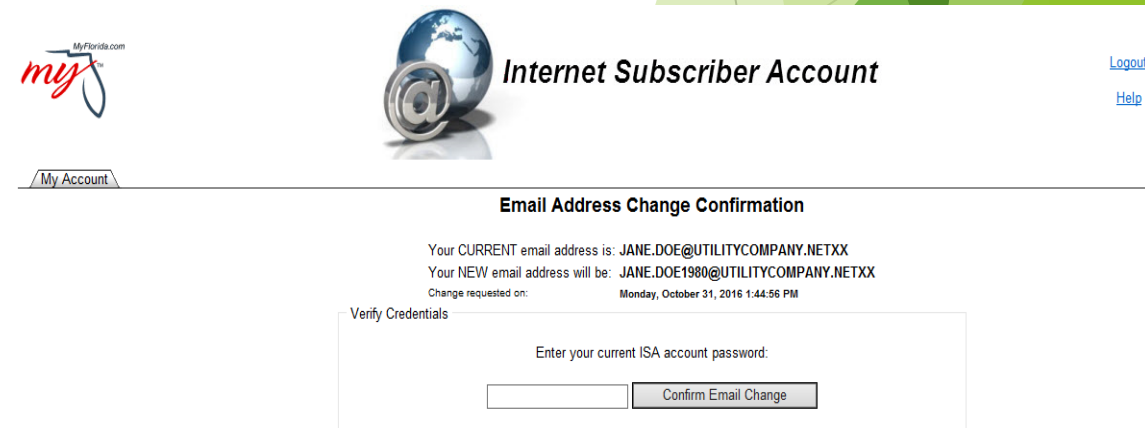
Challenge Answer: MOM [Change Challenge](#)

[Change Email Address](#)

Changing your email = user-id changed

- ▶ Click “Change Email Address” and enter your new address.
- ▶ You will need to reconfirm using a link sent to your new email to activate.

*** All assignments associated to the old email will remain. ***



MyFlorida.com
my

Internet Subscriber Account [Logout](#) [Help](#)

My Account

Email Address Change Confirmation

Your CURRENT email address is: JANE.DOE@UTILITYCOMPANY.NETXX
Your NEW email address will be: JANE.DOE1980@UTILITYCOMPANY.NETXX
Change requested on: Monday, October 31, 2016 1:44:56 PM

Verify Credentials

Enter your current ISA account password:

[Confirm Email Change](#)

What if I change companies?

Log into the ISA application

<https://www3.dot.state.fl.us/internetsubscriberaccount/default.aspx>

Contact FDOT contact(s) by phone or email:

- ▶ FDOT will need to unassociate you to the previous companies and address outstanding assignments.

Create a new ISA account with your new email.

- ▶ Log in to the previous account and unsubscribe.
- ▶ New account is to ensure you have the correct access.

Log back into PSEE with your NEW user-id

- ▶ Request access for District(s) you work for and indicate the Company you represent.

FDOT kick-off of the Utility Module

Each District has a kick-off/implementation plan:

- ▶ District 1 - Select resurfacing & major reconstruction projects with first set of plans will be after the kick-off date
- ▶ District 2 - All projects whose first set of plans will be submitted after kick-off date.
- ▶ District 3 - Begin with selected resurfacing projects whose first set of plans will be after the kick-off date.
- ▶ District 4 - All projects whose first set of plans will be submitted after kick-off date.
- ▶ District 5 - All projects whose first set of plans will be submitted after kick-off date.
- ▶ District 6 - Begin with select projects whose first set of plans will be after kick-off date.
- ▶ District 7 - Begin with select projects whose first set of plans will be after kick-off date.
- ▶ Turnpike - Begin with select projects whose first set of plans will be after kick-off date.

Kick-off Date is January 1, 2017

Who do I contact if I encounter issues or have questions?

- ▶ FDOT District Utility
 - ▶ Your FDOT contact
- ▶ FDOT Utility Module FAC
 - ▶ Shawn Lewis
- ▶ District PSEE Admins
 - ▶ List at the bottom of the application page
- ▶ PSEE FACs
 - ▶ Dianne Perkins
 - ▶ Erica Hewett